Client Guide: myPortal

Login

Go to https://bonadio.myportal.team

Enter your email address, password, then click Log In **(A)**

If you are unsure of your password, click "Forgot your password" and follow the steps to recover it

Basic Navigation

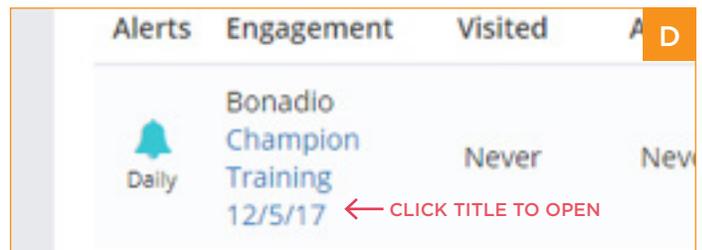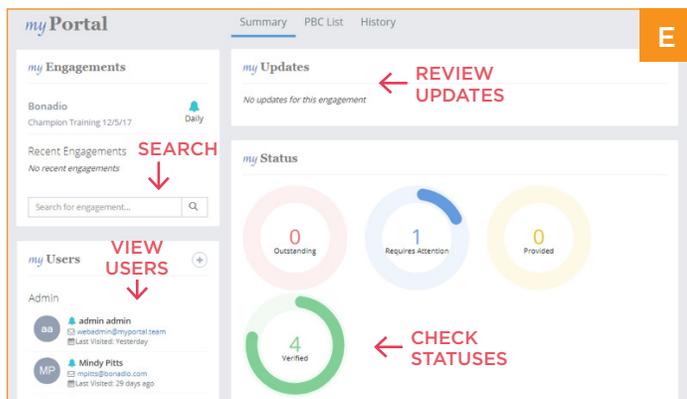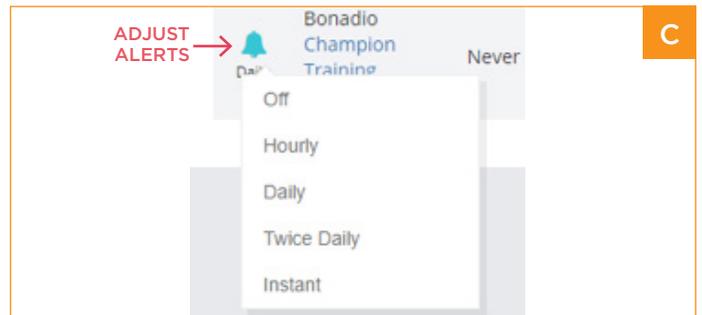Once you login, you'll see your Engagement Dashboard. This shows a list of engagements that apply to you.
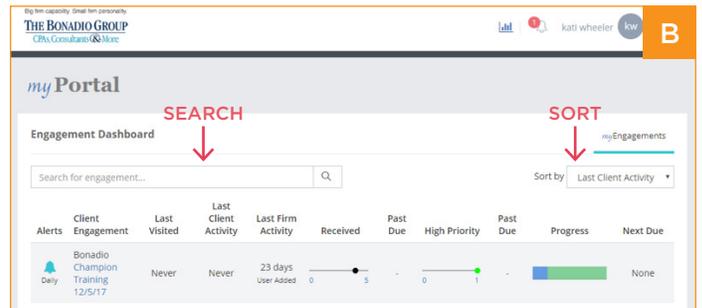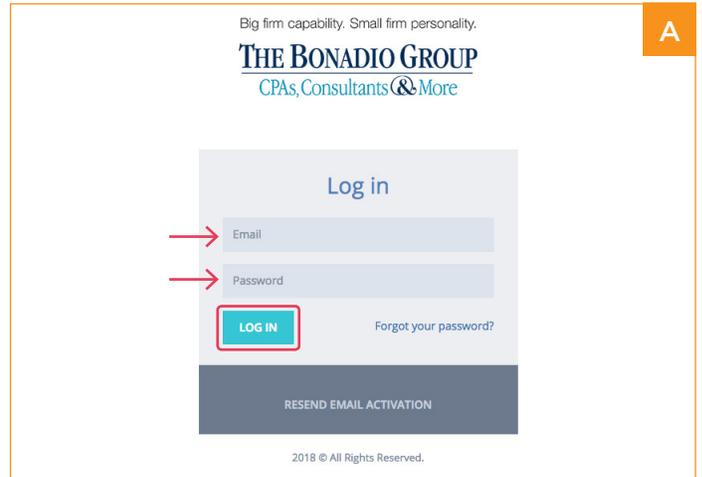
You can search for engagements and sort. **(B)**

Each engagement has an Alerts setting. To change alerts for any engagement, click on the bell icon, then choose your preference. **(C)**

Also note the quick view data provided here. You can see when you've last looked at the engagement and when you or Bonadio last worked on it. It also lists the priority of the engagement, if anything is past due, and what the progress is. Also, if anything else is due, it will note what's next.

Click on the Engagement title to view the engagement details. **(D)**

On the Engagement home, you can still search for other engagements, see a list of users associated with the engagement, get a quick view of updates, and what your statuses are. **(E)**
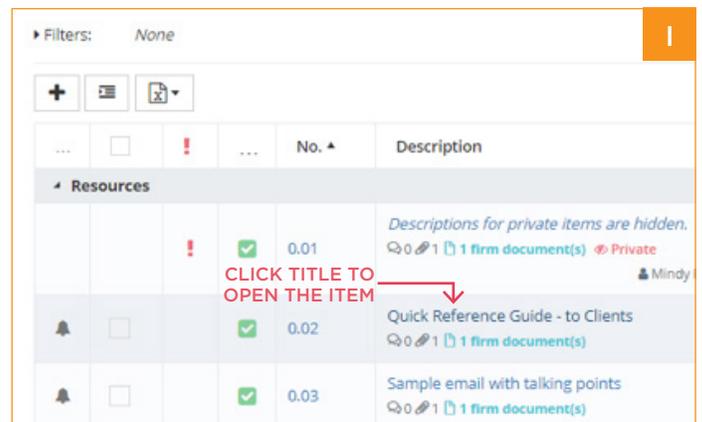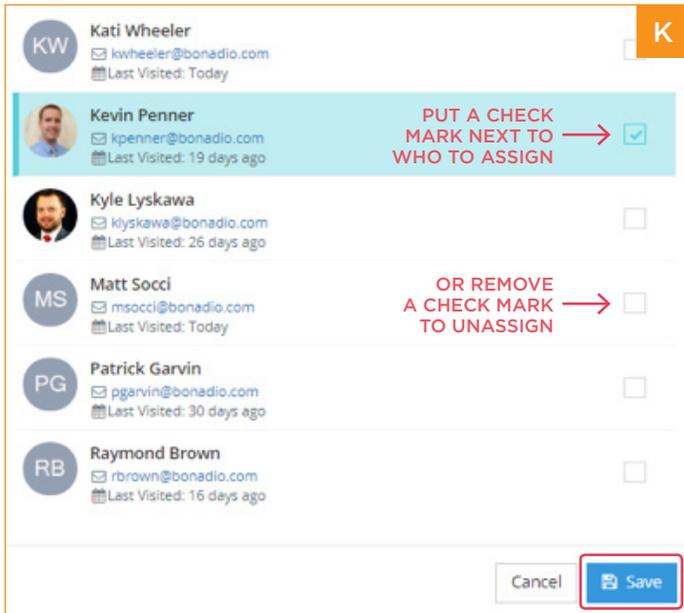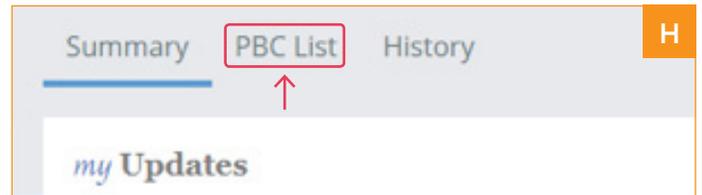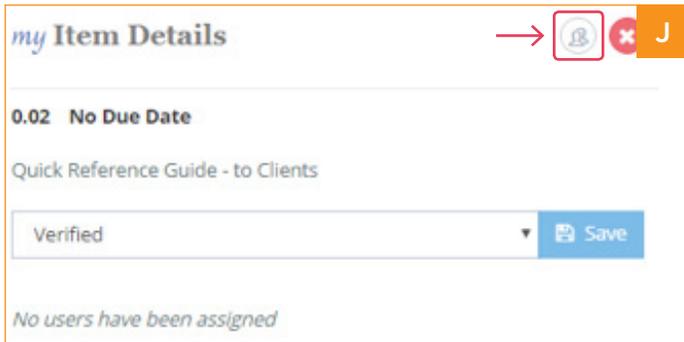
Adding Users

You can add users to an engagement. Click the "plus" sign in the top right corner **(F)** then in the pop up window, type the email address of the person you want to add then click "Add." If they don't have an account, they will be highlighted in blue, and they will receive a notification to create their account. You can also click a box to send all people an invitation email. This is at your discretion. Once you've created your list of people to be added, click "Assign" **(G)**

You can also assign users to specific items in your PBC list. **(H)** When you click on an item, the details will appear on the right. At the top is an icon with silhouettes that you can click. **(J)** It's here that you can remove and assign users. **(K)**

F

my Users

Admin

aa   🔔 admin admin
     ✉ webadmin@myportal.team
     📅 Last Visited: Yesterday

G

Assign Users

ssmith@company.com   **+ Add**
Press Enter after typing the email address above

👤 Client User: kati.rivers@gmail.com   ▾
👤 Firm User: kwheeler@bonadio.com   ▾

Blue   designates users that have not signed up for the portal.

☐ Send Invitation Emails?   ← SEND INVITATION

                                    Close   💾 Assign

J

my Item Details   → 👥 ✖

0.02   No Due Date

Quick Reference Guide - to Clients
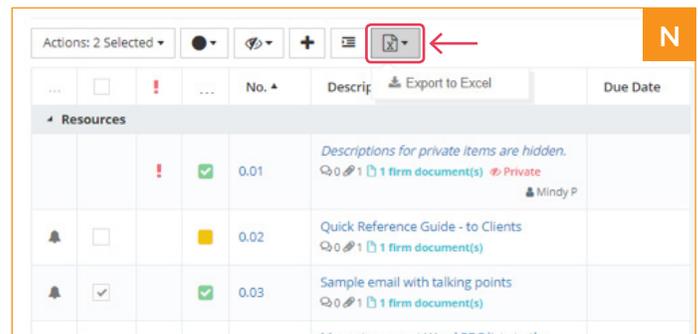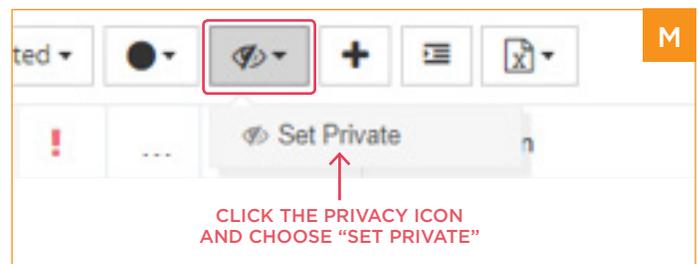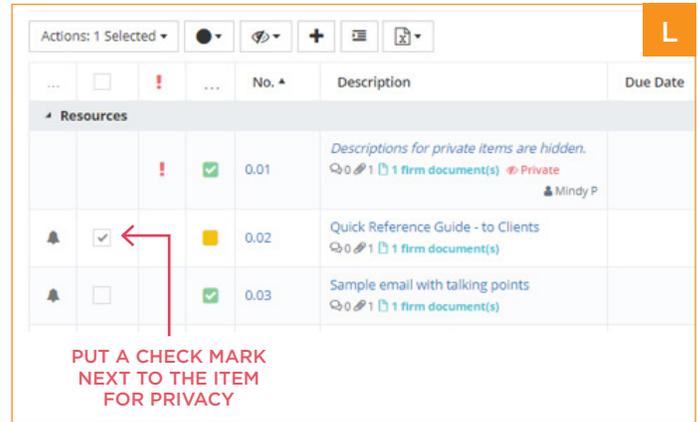
Verified   ▾   💾 Save

No users have been assigned

H

Summary   PBC List   History
                         ↑
my Updates

I

▸ Filters: None

➕ ▤ 📑▾

...	☐	!	...	No. ▲	Description
◂ Resources					
		!	☑	0.01	*Descriptions for private items are hidden.* 💬0 📎1 📄 1 firm document(s) 🚫 Private 👤 Mindy
🔔	☐		☑	0.02	Quick Reference Guide - to Clients 💬0 📎1 📄 1 firm document(s)
🔔	☐		☑	0.03	Sample email with talking points 💬0 📎1 📄 1 firm document(s)

CLICK TITLE TO OPEN THE ITEM

K

KW   **Kati Wheeler**
     ✉ kwheeler@bonadio.com
     📅 Last Visited: Today   ☐

     Kevin Penner   PUT A CHECK
     ✉ kpenner@bonadio.com   MARK NEXT TO → ☑
     📅 Last Visited: 19 days ago   WHO TO ASSIGN

     Kyle Lyskawa
     ✉ klyskawa@bonadio.com   ☐
     📅 Last Visited: 26 days ago

MS   **Matt Socci**   OR REMOVE
     ✉ msocci@bonadio.com   A CHECK MARK → ☐
     📅 Last Visited: Today   TO UNASSIGN

PG   **Patrick Garvin**
     ✉ pgarvin@bonadio.com   ☐
     📅 Last Visited: 30 days ago

RB   **Raymond Brown**
     ✉ rbrown@bonadio.com   ☐
     📅 Last Visited: 16 days ago

                              Cancel   💾 Save

Marking Items for Privacy

You can also mark items as private. When you upload a file, you can adjust whether it's private. If it's private, only those who are assigned can view the contents. You can do this right in the item list. **(L) (M)**

Export PBC List to Excel

You can export the PBC list to Excel. Click the Export icon above the PBC list and choose "Export to Excel." The file will appear in your browser and you can open and save to your computer. Note that excel sheets will open in "Read Only" view. If you need to edit it, click "Enable Editing" at the top of the spreadsheet to do so. **(N)**

L

PUT A CHECK MARK
NEXT TO THE ITEM
FOR PRIVACY

M

CLICK THE PRIVACY ICON
AND CHOOSE "SET PRIVATE"

N

Adding and Downloading Files

You can add a file (or many files) to a PBC list item two ways. First, you can "drag and drop" the file from your computer onto the PBC item. Or, you can click directly on the PBC item then choose "Upload" from the right panel.

Drag and Drop

Click the file on your computer and hold down your mouse button. Drag the file on top of the appropriate PBC list item which becomes highlighted. You should see the file with the word +Copy. Let go of your mouse and the item will Drop into the list. **(O)**

Upload from PBC item panel

Click the PBC Item that you need to upload to.

The right panel will open. Click "Upload File(s)" **(P)**

Navigate to the file on your computer, click it, and click "Open"

Download

You can also download files from your PBC list.

Click the PBC item.

You can download one file at a time by clicking the download icon to the left of the file. **(Q)**

Or you can choose to download all files associated with that PBC item.

Big firm capability. Small firm personality.

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CPAs, Consultants & More
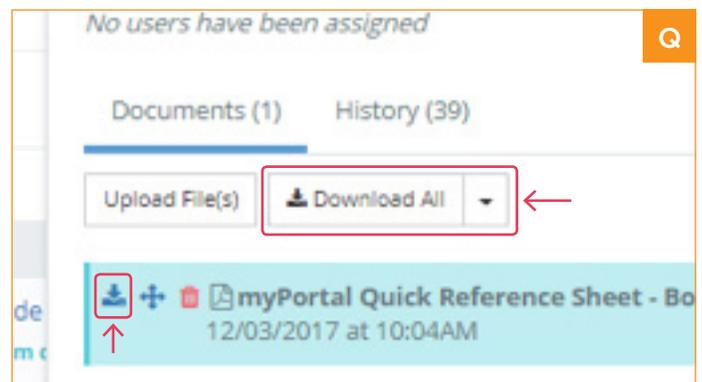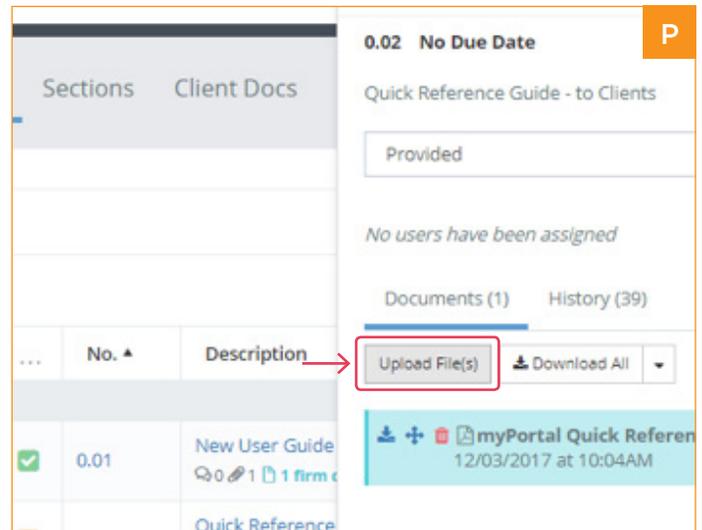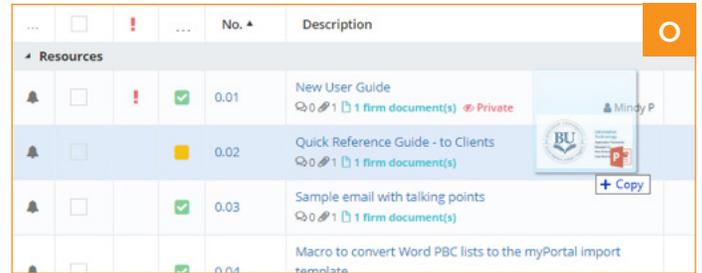
How to Request Support

Having trouble accessing the portal? Send an email to support@bonadio.com with the following information:

- Full name

- Company Name (if applicable)

- Best number to reach you back at

- Details on what you are trying to do such as:
  - Adding a portal user
  - Removing a portal user
  - Adding and downloading files

- Details or screenshot of error messages

You can also reach out to your Bonadio engagement team. They can pass along the information to our IT Customer Support group.

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